

Revision

1.2

U.S. BANK

Cardholders

C. A. R. E. User Manual

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Getting Started in C.A.R.E.

Before you can start working in C.A.R.E. there are a few points to cover: understanding this manual, the web address, minimum system requirements, C.A.R.E. navigation and accessing C.A.R.E. with your user ID and password.

ICON KEY



Tip



Learn More

Using This Manual

This reference manual is designed to give you an overview of the business concepts of C.A.R.E. while also providing you with the procedural steps for performing specific tasks in C.A.R.E. As you move through this document you will notice icons that highlight additional information that will either teach you more about a business concept or give you a tip to help you complete your work more efficiently.

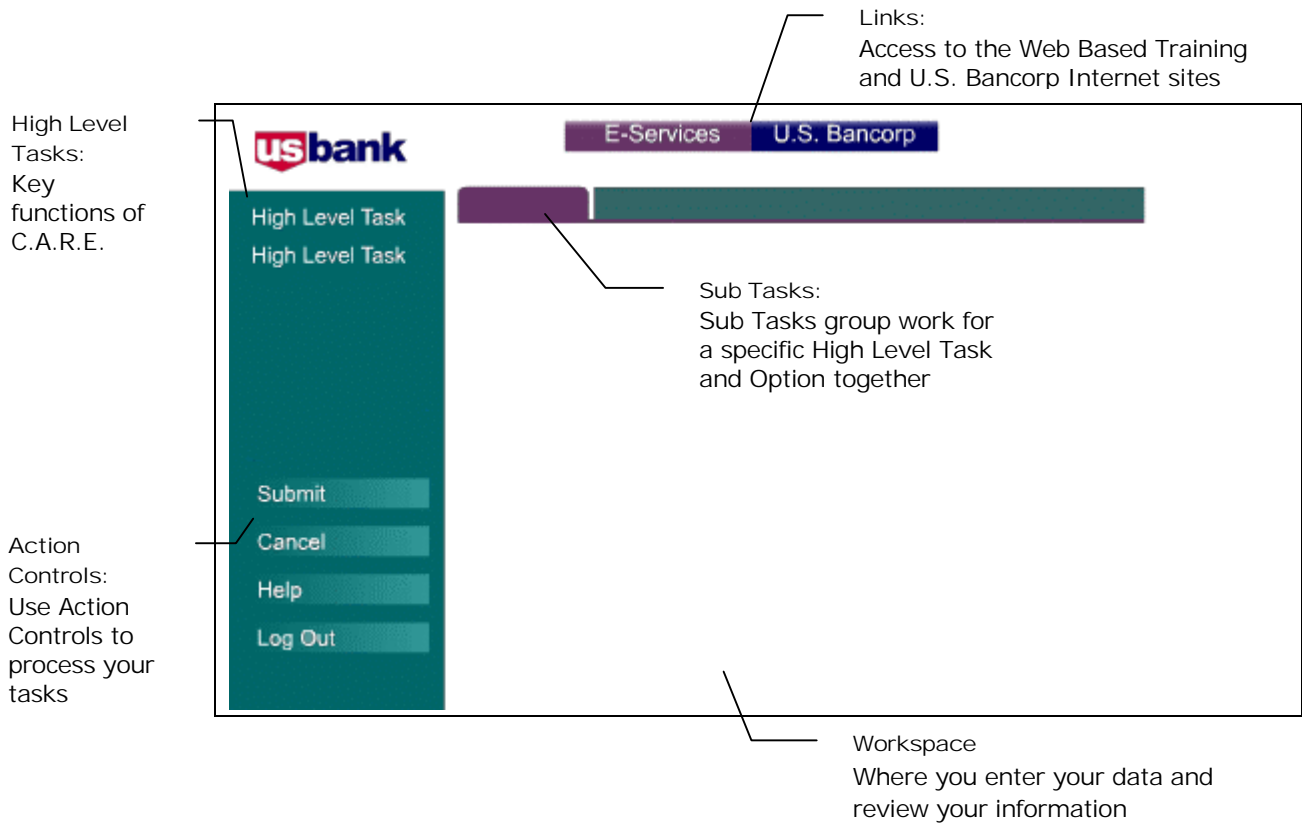
C.A.R.E. Web Address

<https://care.usbank.com>

System Requirements

- Internet Explorer 4.01 or higher, or Netscape Communicator 4.50 or higher with 128 bit data encryption
- Pentium 120 MHz+
- 32 MB memory
- Windows 95, 98, NT 4.0 or higher
- 33.6 modem or higher, or a LAN connection

C.A.R.E. Navigation



Tip !

The first time you log into the system, you are prompted to change your password. Passwords must be 8-12 characters long with at least one alpha and one numeric character. A new password is good only for an initial login, and then you are prompted to change it within the parameters described above.

If, after three attempts, you are not successful logging in to C.A.R.E. contact customer service: Commercial clients 1-877-887-9260, Purchase & Travel Card (CPP) 1-888-994-6722 or Purchase Card (GPP) 1-800-227-6736.

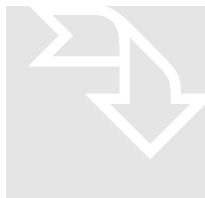
For security purposes while you are in C.A.R.E. the **Back** button in your browser will not work. Using the **Back** button logs you out of C.A.R.E.; if this happens, you must go through the login process again.

On – Line Registration

Overview

On – Line Registration allows you greater access to C.A.R.E in addition to a streamlined process for establishing Cardholder access. With this tool Cardholders can create their own C.A.R.E. user ID's and passwords.

1. Access the C.A.R.E. web address (<https://care.usbank.com>).
2. At the C.A.R.E. log on screen, click **On – Line Registration** on the task bar.
3. Enter the Relationship Registration and User Profile Codes given to you by your Program Administrator.
4. Click **OK**.
5. To add the accounts associated with the user ID and password being established, enter the **Account Number**, **Account Expiration Date** and **Zip Code** in the appropriate fields.



Tip!

- Both Corporate and Purchasing Card account information may be added.
 - Zip code format: Five digits.
 - Expiration date format: MM/YY
 - Information in the table may be edited. Once it is verified and moved to the area below it cannot be edited.
 - You may enter up to ten accounts at a time to one user. If more than ten accounts are needed, click **Add more accounts** and more rows display.
 - If any of the entered information is not valid, the system returns an error message. You have three attempts to correct the information. If all three attempts fail, the accounts with incorrect information are locked out from On - Line Registration. Contact Customer Service, your A/OPC or Program Administrator to unlock accounts.
6. After all accounts are entered, click **OK**. The system validates account information.
 7. Enter Contact Information.
 8. Enter user ID, User Verification and password.



Tip!

- Zip code format: Five digits.
- Phone and Fax number format: No dashes, hyphens, parenthesis or spaces (i.e. 6121234567).
- Fields that require data are identified with an asterisk (*).
- User ID's must be 7 to 12 characters in length, with at least one alpha and one numeric character. User ID's must also be unique; try to think of a distinctive ID (i.e. if your name is John F Smith try the user ID jofsmith3).
- User Verification is used to authenticate you if you forget your user ID or password and need to gain access to that information.
- Passwords must be 8 to 12 characters in length, with at least one alpha and one numeric character.

9. Click **Submit**. The system validates your entries.
10. Click **OK** in the *On – Line Registration was successful* dialog box. You are brought to the C.A.R.E. login screen where you are prompted to change your password. This will be your password for the next 100 days.



Tip!

Accounts are locked when invalid information is entered three times. To unlock your account contact Customer Service, your A/OPC or Program Administrator.

Transaction Management

Overview

Transaction Management allows C.A.R.E. users access to review, approve, dispute, reallocate transactions and/or create or reconcile transaction log entries.

As a Cardholder, you can approve transactions, or if you disagree with a charge you can dispute the transaction online. You can also reallocate a transaction that has been automatically allocated to your Default Accounting Code, to either a Rule Set or an Alternate Accounting Code. Further, you can enhance transactions with supplementary data through transaction logging and reconciliation.

Selecting a Cardholder Account and Transaction

1. Click **Transaction Management** High Level Task.
2. The Transaction Management applet loads.
3. If you are presented with Java Security screens, check the box marked *"Remember this Decision"* and click **Grant** until the Java applet loads. You may need to log out of the browser and your C.A.R.E. session. As updates occur, you may need to periodically update additional Java Security screens.
4. When the applet loads, you are presented with a list of your accounts.
5. Select a **specific account**.
6. Next, select the **cycle date** with which you wish to work. Once a cycle date is selected, the Cardholder Account Summary Information for that cycle displays in the lower portion of your screen.

Cardholder accounts

Cycle dates

Account summary for the selected account and cycle date

The screenshot shows the 'Cardholder Accounts' screen. At the top, there are tabs for 'Cardholder Accounts', 'Transactions', and 'Transaction Log'. Below the tabs, a message says 'Select a cardholder account and cycle to view summary information.' A table lists three cardholder accounts with their numbers, names, and cycle dates. The first account is selected. Below the table, a red box highlights the 'Cardholder Account Summary information for Selected Cycle' section. This section displays details for the selected account and cycle, including the account number, cardholder name, cycle date, statement status, approval date, and approved by. It also shows transaction statistics: Transactions Pending, Total Amount Pending, Transactions Approved, Total Amount Approved, Transactions Disputed, Total Amount Disputed, Total Number of Transactions, and Total Amount of Transactions. An 'Approve' button is visible on the right.

Cardholder Account Number	Cardholder Name	Cycle Date	Total Amount	Status
4716300001606806	COLE,HARRISON,L	01/23/2002	0.00	Open
4716300003132835	GATTA,JEAN,K	12/21/2001	0.00	Approved
4716300003135333	GATTA,JEAN,K	11/23/2001	0.00	Approved
		10/23/2001	0.00	Approved
		09/21/2001	0.00	Approved
		08/23/2001	0.00	Approved

Cardholder Account Summary information for Selected Cycle

Cardholder Account Number: 4716300001606806
 Cardholder Name: COLE,HARRISON,L
 Cycle Date:
 Statement Status:
 Approval date:
 Approved By:
 Transactions Rejected:

Transactions Pending:
 Total Amount Pending:
 Transactions Approved:
 Total Amount Approved:
 Transactions Disputed:
 Total Amount Disputed:
 Total Number of Transactions:
 Total Amount of Transactions:

Approve

- Once a Cardholder account and cycle date is selected, the Transactions and Transaction Log tabs are activated.
- To view, dispute, and/or reallocate transactions associated with a cycle date, click the **Transactions** tab.
- To view detail about a particular transaction, select a transaction from the list. By default, the first transaction is selected and its *Transaction Detail* is shown in the lower portion of the screen.

View individual transactions

Transaction detail

The screenshot shows the 'U.S. Bank C.A.R.E. Transaction Management' screen. At the top, there are tabs for 'Cardholder Accounts', 'Transactions', and 'Transaction Log'. The 'Transactions' tab is selected. Below the tabs, a message says 'Select transaction to view detail.' A table lists several transactions with their status, dates, merchants, cities, states, amounts, and purchase IDs. The first transaction is selected. Below the table, a red box highlights the 'Transaction Detail' section. This section displays details for the selected transaction, including the status, transaction date, posting date, processed by, transaction amount, merchant name, dispute reason, and VISA description. It also shows allocation details: Accounting Code, Amount, and Percent. Buttons for 'Approve', 'Dispute', and 'Reallocate' are visible on the right.

U.S. Bank C.A.R.E. Transaction Management

File View Help

Cardholder Accounts Transactions Transaction Log

Select transaction to view detail.

Account Number: 4246040021090990 Account Name: JONES, SHAE L Cycle Date: 07/16/2001

Status	Trans. Date	Merchant	City	State	Amount	Rejected	Purchase ID
Pending	06/18/2001	ACE HARDWARE	MPLS	MIN	8.25		
Pending	06/03/2001	JOES COMPUTER	SAN DIEGO	CA	6.00		
Approved	06/15/2001	OFFICE MAX	MPLS	MIN	5.50		
Approved	06/15/2001	STAPLES	MUNCIE	IN	4.00		
Pending	06/15/2001	OPINION ONE	CINCINNATI	OH	11.25		

View All Search

Transaction Detail Additional Transaction Detail Trans. Line Item Detail Log Detail Log Line Item Detail

Status: Pending
 Transaction Date: 06/18/2001
 Posting Date: 06/18/2001
 Processed By: H600LTX1
 Transaction Amount: 8.25

Merchant Name: ACE HARDWARE
 Dispute Reason:
 VISA Description:

Approve Dispute Reallocate

Allocation Details:

Accounting Code	Amount	Percent
Default	8.25	100.00

Approving a Transaction

1. Click the **Transactions** tab.
2. Select the transaction you want to approve.
3. Once you confirm that the transaction is valid and you want to approve it, click the **Approve** button located on the Transaction Detail tab.
4. Once the transaction is updated, the status reads *Approved*.

Disputing a Transaction

1. Click the **Transactions** tab.
2. Select the transaction you want to dispute.
3. Once you confirm that the transaction is not valid and needs to be disputed, click the **Dispute** button located on the Transaction Detail tab.
4. A dispute form displays.
5. Select a reason for your dispute and fill out the rest of the form (fields marked with an asterisk are required).
6. Click **Submit**.
7. After you submit the dispute, you are presented with a form that you can print for your records. Once you are finished viewing and/or printing the form, close the window to return to the Transaction Management screen.
8. Once the transaction is updated, the status reads *Disputed*.

Reallocating a Transaction to a Rule Set



Learn More

The transaction reallocation method you use (Alternate Accounting Code or Rule Set) depends on the way the account was originally set up.

1. Click the **Transactions** tab.
2. Select the transaction you want to reallocate.
3. When reallocating a transaction, you can reallocate by dollar amount or percentage. The system automatically calculates the amount of the transaction you still need to reallocate. You are **not** allowed to submit a transaction until the entire amount is reallocated.
4. Click **Reallocate**, located on the Transaction Detail tab.
5. The *Reallocate Transaction* window opens in a new browser window.
6. If you want to allocate a portion of the transaction to the Default Accounting Code, click **Default** under the *Accounting Code* heading.
7. Enter the amount or percent to be allocated to that Default Accounting Code.
8. Click **Update**.
9. To allocate the remainder of the transaction to the Rule Set, click **New Entry** to define the rule set.
10. If the rule set is known, enter it into the *Appropriation Data* field.

11. If the rule set is not known:
 - 11.1. Highlight the **Segment Name** located in the *Accounting Code* window.
 - 11.2. Click the **List All** button to display a list of available values.
 - 11.3. Highlight the correct value.
 - 11.4. Click **OK**.
 - 11.5. Repeat this process for each segment.
12. Once the Rule Set is complete (every segment has a value), enter the amount or percent to be paid to the Rule Set.
13. Click **Add**.
14. Once the transaction is completely reallocated, the Submit button becomes active.
15. Click **Submit**.
16. Once the transaction is successfully reallocated, the Status (on the Transactions tab) reads *Approved*.

Detail about the transaction you are reallocating

Displays the Segments of the Accounting Code

Where you enter the reallocation amount or percentage

Reallocate Transaction

Transaction Information:

Status	Trans. Date	Merchant	City	State	Amount	Rejected
Pending	10/23/2000	JOHNSONSON COMPUTER	NEW YORK	NY	3.99	

Accounting Code:

Segment Name	Value	Required
APPROPRIATION DATA	36899522643129275413	Y
OAC	34	Y
ASN	75241	N
OC	11259	Y

APPROPRIATION DATA 36899522643129275413

Amount: 3.99 or Percent: 60
 Remaining: 0.00

Accounting Code	Amount	Percent
Default	3.99	100.00
New Entry		

Reallocating a Transaction to an Alternate Accounting Code

1. Click the **Transactions** tab.
2. Select the transaction you want to reallocate.
3. When reallocating a transaction, you can reallocate by dollar amount or percentage. The system automatically calculates the amount of the transaction you still need to reallocate. You are **not** allowed to submit a transaction until the entire amount is reconciled.
4. Click **Reallocate**, located on the Transaction Detail tab.
5. The *Reallocate Transaction* window opens in a new browser window.
6. If you want to allocate a portion of the transaction to the Default Accounting Code, click **Default** under the *Accounting Code* heading.
7. Enter the amount or percent to be allocated to that particular accounting code.
8. Click **Update**.
9. Select an Alternate Accounting Code under the *Accounting Code* heading.
10. Enter the amount or percent to be allocated to that particular Alternate Accounting Code.
11. Repeat this process until the entire transaction is reallocated.
12. Click **Submit**.
13. Once the transaction is successfully reallocated, the Status (on the Transactions tab) reads *Approved*.

Reallocating a Transaction to an Alternate Accounting Code with Multiple Values

1. Click the **Transactions** tab.
2. Select the transaction you want to reallocate.
3. When reallocating a transaction, you can reallocate by dollar amount or percentage. The system automatically calculates the amount of the transaction you still need to reallocate. You are **not** allowed to submit a transaction until the entire amount is reconciled.
4. Click **Reallocate**, located on the Transaction Detail tab.
5. The *Reallocate Transaction* window opens in a new browser window.
6. If you want to allocate a portion of the transaction to the Default Accounting Code, click **Default** under the *Accounting Code* heading.
 - 6.1. Enter the amount or percent to be allocated to that particular accounting code.
 - 6.2. Click **Update**.
7. If you do not want to allocate a portion of the transaction to the Default Accounting Code, click **Default** under the *Accounting Code* heading.
 - 7.1. Click **Delete**.
8. Select an Alternate Accounting Code under the *Accounting Code* heading.
9. Segment name, Values and Required fields populate with information.
10. If no values display for the Alternate Accounting Code it means that there is more than one value from which to choose.
11. Select the value you want from the drop-down list.
12. Enter the amount or percent to be allocated to that particular accounting code.
13. Repeat this process until the entire transaction is reallocated.
14. Click **Submit**.
15. Once the transaction is successfully reallocated, the Status (on the Transactions tab) reads *Approved*.

Transaction Logging: Appending Transaction Detail



Learn More

Append transaction detail if the transaction data passed from the merchant is insufficient.

1. Click the **Transactions** tab.
2. Select the transaction to which you want to append detail.
3. To add user-entered detail (e.g., Sales Tax, Freight Amount, etc.) to a transaction, click the **Log Detail** tab.
4. Enter the additional data in the fields provided. Fields marked with an asterisk (*) are required.
5. Once you have finished entering the additional information, click **Save Log** to save the entry.
6. To enter additional information (e.g., Unit Price, Part Number, etc.) about the transaction, click the **Log Line Item Detail** tab.
7. You must enter information in at least one field to create log line item detail.
8. Once you have finished entering the additional information, click **Enter**.
9. Click the **Log Detail** tab.
10. Click **Save Log**.

Transaction Detail	Additional Transaction Detail	Trans. Line Item Detail	Log Detail	Log Line Item Detail
Transaction Date: / /		Need Date: / /		Requestor Name:
Date Received: / /		Due Date: / /		Trans. Method:
Merchant:		Authorization #:		
Transaction Amt.: 0.00		Vendor Order #:		
Sales Tax: 0.00		Other:		
		Shipped To:		
Source Currency:		Comment:		
Source Amount: 0.00				

Transaction Logging: Creating and Maintaining a Separate Log Entry



Learn More

You can record detail about a transaction that has not yet posted (e.g., a purchase made on the Internet) using the Transaction Log tab in Transaction Management.

1. Click the **Transaction Log** tab.
2. To add user-entered detail (e.g., Sales Tax, Freight Amount, etc.) to a transaction, click the **Log Detail** tab.
3. Enter the additional data in the fields provided. Fields marked with an asterisk (*) are required.
4. To enter additional information (e.g., Unit Price, Part Number, etc.) about the transaction, click the **Log Line Item Detail** tab.
5. You must enter information in at least one field to create log line item detail.
6. Once you have finished entering the additional information, click **Enter**.
7. To finish logging the transaction, click the **Log Detail** tab.
8. Click **Add** to save the entry.

To view and/or edit your log entries at a later time, click the **Transaction Log** tab and select the log entry you want to maintain.

Transaction Logging: Reconciling a Posted Transaction

1. Click the **Transactions** tab.
2. Select the transaction you want to reallocate.
3. Click the **Log Detail** tab.
4. Click the **Reconcile** button.
5. The *Reconcile Transaction with Log* window opens in a separate browser window.
6. The system attempts to match the selected transaction with the closest transaction log entry in the list of available entries. For automatic reconciliation to occur there must be an exact match of certain data (e.g., account number, purchase ID number). If no match occurs with the data, you have to manually reconcile the transaction.
7. If the system does not select the correct log entry, remove the incorrect entry and manually select the correct log entry from the list of available log entries by using the Add and Remove buttons.
8. Once you select the desired log entry for the transaction you want to reconcile, click the **Reconcile** button.
9. Once the transaction successfully reconciles, the log entry information is copied to the Log Detail and Log Line Item Detail tabs. The transaction information passed by the merchant remains intact on the Transaction Detail and Additional Transaction Detail tabs. Note: no part of the logging process ever overwrites any transaction information passed from the merchant.
10. Once the transaction is successfully reconciled, the Status (on the Transactions tab) reads *Approved*.

Reconcile Transaction with Log

Posted Transaction to be matched:

Transaction Date	Merchant	Transaction Amount	Authorization Number
10/30/2000	JOHNSON COMPUTER	109.00	RES901

Best match from transaction log:

Transaction Date	Merchant	Transaction Amount	Authorization Number
10/30/2000	Johnson Computer	109.00	RES901

Add Remove

Available log entries:

Transaction Date	Merchant	Transaction Amount	Authorization Number
10/30/2000	Johnson Computer	109.00	RES901

Reconcile Cancel

Approving a Cardholder Cycle Activity

1. Click the **Cardholder Accounts** tab.
2. Once you have selected a cycle date, the Account Summary Information displays.
3. You can only approve the cycle summary information if the following criteria are met:
 - The cycle date is currently unapproved.
 - There is no pending transaction on the statement.
4. To approve the account summary information, click the **Approve** button located in the lower portion of your window.
5. Once the account summary information is updated, the status reads *Approved*.

Reporting

Overview

The Reporting High Level Task in C.A.R.E. is comprised of a standard report, which is a report that has a pre-defined layout. Once you select the standard report you are given the option of selecting the date range you would like for your report. After your report is compiled, you have the option of viewing it online, printing it or saving it to your computer.

Running a Report

1. Click the **Reports** High Level Task.
2. A new browser window opens, which allows you to select a date range for your report.
3. Select either the predefined date (current month) or choose your own date range. Be sure to use the following date format: YYYYMMDD
4. Click the **Submit** button.
5. The report displays in a new browser window.

usbank
Cardholder Activity Detail

JONES SHAE L
1010 S 7TH ST FETT 0112 368990003002000700
MINNEAPOLIS MN 55415

Transaction Date	Transaction Post Date	Transaction Reference Number	Description	Merchant Name	City	St.	Amt.	SIC Code
07/25/2000	07/25/2000	7479826020720711111194		OPIOION ONE	CINCINNATI	OH	3.49	7375
Description:								
07/25/2000	07/25/2000	7479826020720711111160		TRANSPORTATION WORLD	CHICAGO	IL	5.00	7513
Description:								

Document: Done

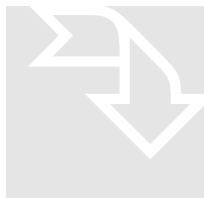
6. To save the report to your computer, click File > Save. Choose a location for the report.
7. To print the report, click the **Print** icon in your browser.
8. When finished with the Reports window, click the **X** in the upper right corner of the window.

Communication

Overview

C.A.R.E. provides a secure communication mechanism for receiving and replying to messages and attachments between you and key U.S. Bank contacts. All messages are stored in C.A.R.E. for up to 90 days before they are purged from the system.

Setting up File Transfer Capability



Tip !

If you have never saved an attachment using C.A.R.E. Communications, follow the steps below to enable your browser to save file attachments. If you do not setup your browser with the following steps, you will be logged off C.A.R.E. when you attempt to save a file attachment.

Both Internet Explorer and Netscape

1. Click the **Start** menu > click **Programs** > open **Windows Explorer**.
2. Click **View** > click **Options**.
3. Click the **File Types** tab.
4. Choose "file types" depending on the types of files you expect to receive through C.A.R.E. Some common file types you may receive include; doc, xls, zip, exe (batch version only), html (or htm), ppt, rtf, txt.
5. Click **Edit**.
6. Check the box marked "confirm open after download". Ensure the box marked "enable quick view" is not checked.

Repeat steps 4 through 6 for all the file types you expect to receive through C.A.R.E.

File Extension “txt” for Netscape

1. In the Netscape browser, click **Edit** > **Preferences**.
2. Click **Applications**. A list of available applications will be displayed.
3. Choose “Plain Text” from the applications list.
4. Click **Edit**.
5. Choose the “Save to Disk” option and close the window.

File Extension “txt” for Internet Explorer

1. Internet Explorer does not currently generate a download prompt for txt files; it automatically opens txt files in the browser.

To return to your C.A.R.E. session, click the **Back** button and click **Refresh**.

Accessing Messages

1. Click the **Communications** High Level Task.

Viewing a Message

1. Click on the sender’s name to select the message you wish to view.
2. Once you have viewed the message you can keep, reply to or remove the message.

Viewing an Attachment

1. Click on the sender’s name to select the message.
2. Within the message, click the file attachment hyperlink.
3. The attachment will open in a separate window; you may either save or print the attachment.
4. When finished close the attachment browser window.

Replying to a Message

1. Within the message, click the **Reply** button.
2. To attach a file to your reply, click the **Browse** button beside the *File to Attach* field.
3. Select the file you wish to attach.
4. Click **OK**. The file name populates the *File to Attach* window.
5. Click **Attachments**.
6. Type your reply in the designated space above the line named “Reply Separator.”
7. Click **Submit** to send your response.

Deleting a Message

1. Once you have read a message and you do not wish to keep it, click the check box beside the senders name and then click **Remove**.
2. To remove all the messages from your system, click **Select All** and then click **Remove**.

Administration

Overview

- The Administration High Level Task is where you can perform the administrative task of resetting your password.

Resetting a Password



Tip !

- When resetting your password make sure that at least one character is different from your previous password.
- Your password must be 8-12 characters long with at least one alpha and one numeric character.
- Passwords are not case sensitive. However, all information that is returned by C.A.R.E. is displayed in uppercase.

1. Click the **Administration** High Level Task.
2. Verify that the Name and User ID are correct.
3. Click in the *Current Password* field.
4. Enter your current password, and press the Tab key.
5. Enter your new password, and press the Tab key.
6. To confirm the change, re-enter your new password.
7. To process the request, click **Submit**.

E-Links

Overview

At the top of every page in C.A.R.E. there are two e-links:

- E-Services
- U.S. Bancorp

The E-Services link takes you to the following C.A.R.E. information:

Contact information (phone numbers for the help desk and customer service)

- Additional C.A.R.E. documentation
- C.A.R.E.'s Web-Based Training

The U.S. Bancorp link takes you to the U.S. Bancorp home page where you can learn more about personal and business solutions for your financial and investment needs, along with the following information:

- ATM locations
- Press releases
- Annual reports
- C.A.R.E.'s web based training.

Help

Overview

C.A.R.E. Help allows you to quickly access multiple levels of information based upon the context of your workflow. When Help is selected, a new browser window opens making it possible to view the contents of Help, while also keeping your C.A.R.E. session open.

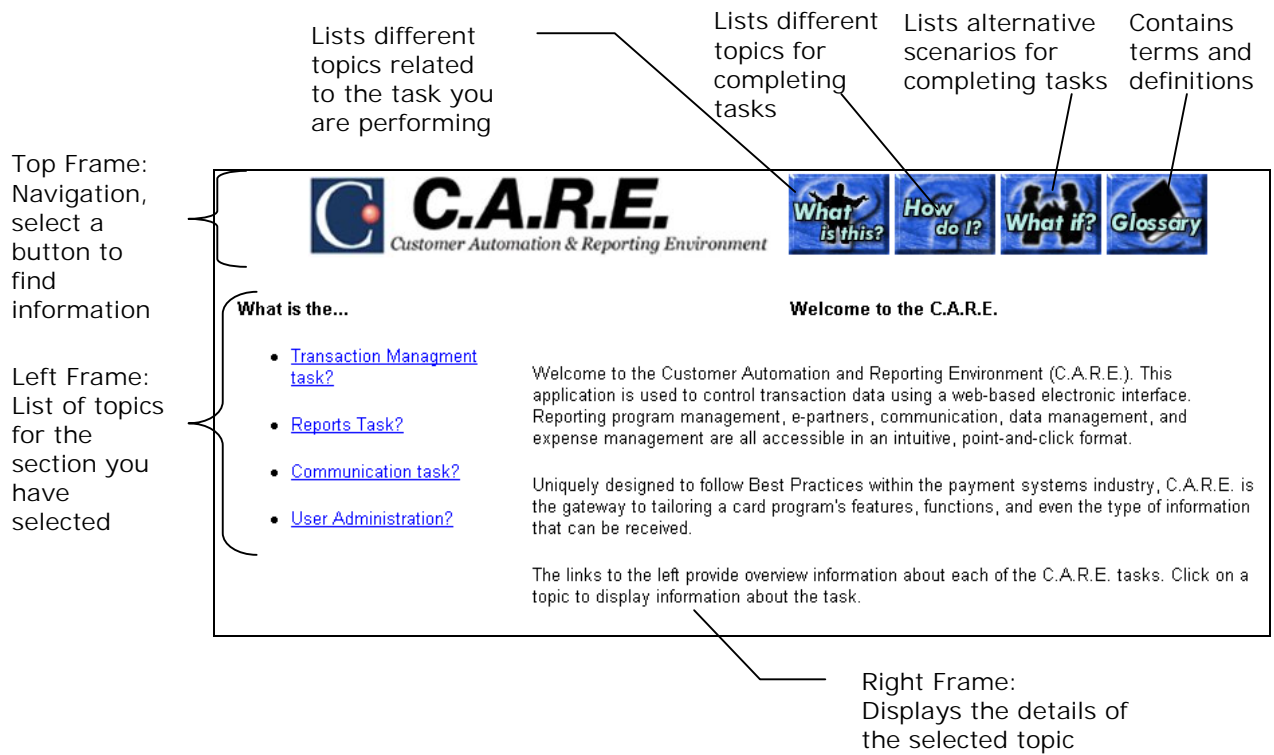
Help is divided into four sections, which are structured around questions commonly asked when performing an unfamiliar task:

- What is this? – Lists different topics related to the task you are performing
- How do I? – Lists different topics, which help you complete a particular task
- What if? – Lists alternate scenarios for completing tasks
- Glossary – Contains terms and definitions

Depending upon the type of information you require you can access any or all of the Help sections.

Accessing Help

1. Click **Help** from the Action Control menu.
2. A new browser window opens, so you may view the contents of Help while your C.A.R.E. session remains open. The information displayed is based on the work you are doing.
3. Based on the type of information you need pick one of the four questions in the top frame.
4. To close Help click (X), or to minimize Help, click the (└) at the top right-hand corner of the screen.



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